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ABSTRACT

Information compiled from 50 states is presented to help schools, districts, and states look for answers on how to best provide incentives to improve education. Five key questions are addressed: (1) Are states linking rewards to performance of teachers or students? (2) Are incentive programs creating new roles for teachers and principals? (3) Are states continuing to fund incentive programs? (4) What has changed in schools because of incentive programs? and (5) What is the outlook? A chart lists state actions on incentive programs for each of the 50 states in 1990. The chart provides information on each state in the following areas: local initiative; pilots with state funding and/or assistance; full implementation of state program; state program under development; discussion--no legislative action pending; and type of program (e.g., teacher incentive, career ladder, mentor teacher). A narrative description is given of the program implemented or under consideration for each individual state. (JD)

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Southern Regional Education Board
CAREER LADDER CLEARINGHOUSE

January 1991

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Linking Performance to Rewards for Teachers, Principals, and Schools

The 1990 SREB Career Ladder Clearinghouse Report

Actions across the nation during 1990 demonstrated a continuing emphasis on results for schools. New national education goals for the year 2000 call for all children to be ready for first grade, for a significant increase in high school graduation rates, and for improved student performance in English, mathematics, science, and geography. Over the past year, states and local school systems have increased funding for career ladder, school incentive, and teacher incentive programs that link rewards to performance or additional work.

★ The Southern Regional Education Board published *Educational Benchmarks, 1990* to provide information about progress being made toward the measurable goals that have been established by SREB states.

★ The National Governors' Association in its *Educating America: Strategies for Achieving National Goals* said actions should include rewards for school improvement—including "a full range of student achievement, not just average performance. . . ." The NGA report noted that "differentiated pay is essential if schools are to compete for talented individuals. . . ."

★ 25 states across the nation are funding teacher incentive programs that include career ladder or mentor programs. Recent legislation in Oklahoma established a teacher incentive program. Kentucky's new education law calls for a teacher compensation plan that includes performance, length of school year, and related duties. Michigan funded a program that requires all schools to develop five-year improvement plans, which can include teacher incentives. South Dakota's Department of Education has earmarked funds to begin a mentor program.

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TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

- ★ Ten states have school incentive programs, including Kentucky, which established a plan in its 1990 legislation. Other states (Colorado, Florida, Indiana, Louisiana, Pennsylvania, South Carolina, Texas, and Washington) continue to fund or develop school incentive programs. Mississippi passed a law establishing the "Lighthouse Schools" plan that would reward innovative schools and disseminate their successful practices.

- ★ The U.S. Department of Education's School and Staffing Survey of 1988 showed that about 300,000 of the nation's 2.2 million public school teachers were receiving incentive pay in career ladder programs. When all teachers were asked whether they favored incentive programs, about 70 percent favored career ladder programs; 64 percent supported group merit bonuses; and 53 percent endorsed individual merit pay.

States, districts, and schools continue to support existing incentive programs and experiment with new approaches—all in an effort to recognize and reward teachers and principals.

For the seventh year, the Southern Regional Education Board's Career Ladder Clearinghouse has compiled information from 50 states across the nation to help schools, districts, and states look for answers on how to best provide incentives to improve education. Frequently asked questions during 1990 include:

- ❑ Are states linking rewards to performance of teachers or students?
- ❑ Are states continuing to fund incentive programs?
- ❑ What has changed in schools because of incentive programs?
- ❑ What is the outlook?

Linking Rewards to Changes in Schools

Are more states linking rewards to the performance of teachers or students?

Incentive programs that have been mandated and developed over the past two or three years have generally focused on school incentives. They reward schools or individual teachers and principals for improvements such as increased student achievement or reduction of dropouts.

Michigan's new school improvement plans include student achievement as a criterion. Indiana, Iowa, Louisiana, Pennsylvania, and Texas created school incentive programs based on achievement in the late 1980s. South Carolina continues its school incentive program which was developed in 1984 and uses test scores, dropout and attendance data, and other measures.

The Kentucky Education Reform Act of 1990, funded at a total of $1.2 billion over two years, provides a rewards program based on school-wide improvement. Staff will determine how funds are spent. Florida replaced its Quality Instruction Incentive Program (created in 1984) with another school incentive program that includes rewards for high schools where students take more mathematics and science courses. Florida continues another program created in 1989 to that provides financial incentives for improved student outcomes.

The Texas Governor's Educational Excellence Award Program focuses on the problems of students dropping out and low student achievement. In the fall of 1990, schools received awards ranging from $10,000 to $100,000. The funds can be used for any educational purpose within a school but cannot be used for salaries or athletics. Almost 300 Texas schools shared $7.7 million for improved test scores. High schools received extra funds for improved scores and higher participation rates on college entrance tests.

Legislation passed in 1988 in Pennsylvania created the School Performance Incentives program. Schools receive awards if they demonstrate sufficient improvement in any of three areas: student achievement as indicated in statewide testing; reduction of dropout rates, and preparation for higher education (as indicated by raising Scholastic Aptitude Test participation rates *and* scores). Funds are allocated among the schools in proportion to their numbers of full-time-equivalent teachers. Subject to the district board's approval, the staff of the school decides how to use the award to further improve education within that school. Schools cannot use awards for salary increases or bonuses to current employees. Early in 1989, this program distributed $5 million to 202 schools; in 1990, an identical sum was distributed among 235 schools. The 1990-91 budget also includes $5 million for this program.

In Colorado, guidelines have been developed for the Colorado Excellence Program. Schools are invited to apply for awards based on outstanding educational performance. The program is voluntary and provides rewards for schools that set and meet goals. Awards will be granted on the basis of a two-year effort in each school. A State Performance Awards Panel composed of citizens, legislators, educators, and a representative of the Higher Education Commission will recommend schools for the rewards. Money may be used for bonuses or other purposes determined by the school, although it cannot supplant other funding. The state has not yet funded the program, but is soliciting private support.

The Louisiana School Incentive Program was funded at $200,000 in 1990-91 for development. Schools will be rewarded for making significant progress on a number of categories. At least 100 schools will be initially identified as having made progress, and cash awards will be used for instructional purposes. School councils will work with teachers and principals and determine the use of the award. In Iowa, school districts develop performance-based and supplemental pay plans determined by the progress made toward identified goals. One of the most common goals adopted in 1988-89 was to improve student academic performance.

In a program that can provide incentives for teachers or schools, 1990 legislation in Oklahoma called on the State Board of Education to develop five model teacher incentive pay plans. Districts must adopt a plan upon a vote of 20 percent or more of the teachers. Districts

are also encouraged to develop teacher pay scales based on subject area or geographic need. The guidelines developed by the State Board of Education have defined programs that reward individual teachers, teams of teachers, or school sites for reaching goals. The plans must be based on measures of progress in student achievement, but students' test scores cannot be the sole criterion for incentive pay. Models include an approach in which goals are set for teachers as well as students; a contract model in which teachers develop innovative projects that improve student achievement; a master teacher program that provides for extended contracts; a school site/individual model that rewards teachers for achievement gains of students; and a performance model that depends on multiple sources of data, such as student work, teacher tests, and classroom observations of teachers. The contract/innovative model and the master teacher programs were patterned after plans of several districts in the state.

Several new programs that focus on incentives for teachers who take on additional or special duties are also under development. In Kentucky, individuals designated as "distinguished educators" (teachers and principals) will work with schools and receive extra pay. The Mississippi law (not yet funded) would provide for supplements to teachers coaching academic teams. West Virginia provided $2 million for a center for professional development to promote quality teaching in public schools. A 1990 amendment to the Iowa Educational Excellence Program provides salary increases for teachers who work to restructure schools.

Another trend links school success to relief from state standards, providing an incentive for teachers, principals, and schools to achieve. This trend has been evident in actions in Indiana, Kentucky, Florida, Mississippi, North Carolina, Oklahoma, Oregon, South Carolina, Texas, and Washington during the past several years.

In South Carolina, districts that meet standards and receive school incentive awards are allowed to ask for waivers. To be eligible for a waiver, a school must have received a school incentive grant (based on student achievement gains) for at least two years, not have the same accreditation deficiencies two years in a row, and meet annual state standards for improvement in remedial reading and mathematics. Possible waivers include relief from staffing requirements, minimum time of instruction for particular subjects, and class length.

In 1989, the Oregon legislature adopted the *21st Century School Program* to make fundamental changes to school operations and to formal relationships among teachers, administrators, and local citizens. Schools or districts submit plans to the Department of Education that include, for example, proposed changes to curriculum requirements; graduation requirements; the certification, assignment, and formal responsibilities of teachers, administrators, and other school personnel. Schools must also include the student learning and educational outcomes that are expected and a description of the statutes and rules that are to be waived to complete the plan.

A program initiated two years ago, Washington's *Schools for the 21st Century*, provides grants to schools to develop innovative programs. Twenty-one schools received grants from a $3.5 million fund appropriated for 1989-91; 12 additional grants were awarded in 1990-91 with an extra $1.7 million. The proposals were developed at the school level with parent,

teacher, and administrator involvement. The grants may be used, for example, to purchase equipment and supplies, provide in-service training for instructional staff, and pay staff for working additional days (all of the proposals added at least 10 days to the teachers' school year.) Schools are permitted to request exemptions from normal state regulations.

In North Carolina, 1989 legislation established a program in which districts could agree to meet accountability standards and be allowed flexibility. Senate Bill 2 provided that districts wanting flexibility and additional funds must develop three- to five-year goals and show how the additional money will be spent. Initially, schools most frequently asked to use teaching assistants and to increase class size. The differentiated pay plans that were developed included multiple ways to earn additional pay. The most common option was extra pay for teachers assuming extra work. Rewards are based on student or school outcomes, meritorious performance for extra pay, and additional pay for teachers and school administrators to participate in staff development. Six districts are paying extra salary to teachers that accept hard-to-fill assignments.

In Utah, some districts are receiving career ladder funding in a block grant and have been freed from program requirements and reporting. Evaluations will be conducted this year on parts of the career ladder program. In Indiana, the State Board of Education is proposing that the 1991 General Assembly include initiatives that would increase the number of restructuring projects that encourage flexibility of state rules.

The 1990 Kentucky legislation mandated a shift to school-based management. Each school district must have at least one school with school-based management in 1990-91 and must phase in a districtwide program over several years. In Texas, a 1990 law waived state rules and regulations for schools rated as exemplary in meeting state standards. In Florida, 1990 legislation granted flexibility for districts developing innovative programs in the early grades. In Oklahoma, the 1990 law called for a school deregulation committee to examine possible areas for deregulation and flexibility. In its as-yet-unfunded law, Mississippi provided that schools designated as "outstanding" would be eligible for waivers of some regulations.

In the last several years, a clear trend has developed in the direction of incentives that focus on school performance. It is less clear whether this trend means that programs rewarding teachers for the work they do will be gradually de-emphasized in favor of efforts to reward teachers for what students learn.

Promoting New Roles in Schools

Are incentive programs creating new roles for teachers and principals?

Program design alone may not determine whether teachers or school principals are taking on new roles as a result of incentive programs, according to researchers at the University of Northern Arizona. In a five-year, third party evaluation of the Arizona Career Ladder Pilot Program, the "readiness of a school district is absolutely necessary for successful implementation of the career ladder program" (Packard and Dereshiwsky, March 1990).

The Arizona research found that before the career ladder program has an impact on student achievement and teacher performance, the districts have to be ready. They must have key pieces of the program in place, including the local school board's support, funding, communication within the district, a well-aligned curriculum with objectives and assessment, adequate teacher in-service, and incentives for developing classroom skills. The research showed that the districts in the pilot program were at wide ends of the spectrum in their organizational abilities and their capacity to really change what teachers do in the classroom to improve student achievement. Researchers found that within a district, one or two missing pieces could stall efforts to implement a career ladder program.

Another study of three districts pointed out how a few key factors can control the amount of change that occurs at a school site (Firestone & Bader, 1990). Two districts implemented career ladder programs; the other began a shared governance plan. As with other studies, the issue of whether the program was seen as job enlargement or a "merit system" was a major factor in teachers "buying into the program." The merit pay system challenged the teachers' preference for equality and required top-down actions to implement, therefore creating resistance. Whether teachers were included in planning, whether the interests of board members and administrators were served, and whether the teacher association was satisfied all affected the program's success. A broader consensus was achieved when guidelines were perceived as less strict and the focus was on professionalization rather than job standardization. The superintendent's skill in managing the implementation and in building alliances and support for a program was a critical factor in all districts.

A 1990-91 pilot program in Louisiana, The Model Career Options, is providing opportunities for teachers to take on new and expanded responsibilities and receive salary bonuses for advancement. In the second year of the pilot project, three categories of career options are being tried: teachers working with other teachers, teachers providing instructional programs in an extended day or school year, and a model for locally developed ideas. In the pilot program, the models are being tested in a variety of district settings across the state. The pilot programs are being evaluated so that refinements can be made before statewide implementation.

In an extension of the idea that teachers should be involved in designing and planning programs, the North Central Regional Educational Laboratory (NCREL) developed a teacher-researcher program in which incentive programs would be studied by teachers, creating a new role for teachers that in itself was seen as an incentive (Dorman & Fulford, 1990). Since these teachers know the history of a district, they are in good positions to carry out such work. In addition, it provided a cost-effective way to conduct research.

Five NCREL studies were conducted on incentive programs in districts in Iowa, Illinois, Ohio, and Wisconsin. The programs included a mentor program, a grant program for teachers, a performance model for extra pay, and a career ladder. The studies showed common pitfalls to be avoided—underfunding and poor communication were common themes. The research tended to show that teachers who participate have very positive attitudes toward incentives, that new roles for teachers were created, and that teachers worked more with other teachers. Two studies looked at student outcomes. In one district, student gains were attributed to the

professional development activities that were part of a career ladder program. The difficulty in attributing gains to a particular incentive program was noted. The studies concluded that no one incentive was best for all teachers but, as professional opportunities and recognition increase, teacher satisfaction increases.

In Maine, teachers have become active participants in their own certification process. An evaluation of the Maine career ladder certification program mandated by 1984 legislation has been completed (Hoppe & McAllister, 1990). The law created career ladder certification levels, gave the authority for certification to the state and local districts, and tightened rules for certification. According to the study, Maine has now developed a certification system based on performance and one that provides more professional accountability. Districts have developed support structures for beginning teachers. Experienced teachers plan their own programs to be recertified and have the plans reviewed by peers—rather than just taking courses. The study showed that teachers disliked the additional paperwork involved in demonstrating they have met established goals. One problem is that plans submitted by teachers varied widely across districts, creating different standards for recertification across the state. Few teachers have sought the highest level of certification—the master teacher credential. It seems unclear to many teachers what the significance or possible rewards for this certificate might be. Three-fourths of the teachers interviewed in the study did not support the master-level certificate, citing "too much extra work and lack of compensation for the additional work." (Only one district linked certification to career levels, and in that district teachers supported the idea.) Delivering needed coursework in isolated areas of the state was also seen as a problem.

In another look at new and emerging roles for teachers, researchers found that while career ladder programs can increase compensation and decrease classroom isolation, differentiated roles can be threatening to teachers (Koppich, Brown & Amsler, 1990). When programs require teachers to take on additional authority, the change takes considerable time, the authors reported. They also identified limits on the additional responsibilities teachers are willing to accept. Career ladder policies will need to respond to local needs, and the best policies may be ones that also evolve or change. Two risks in redefining roles for teachers are highlighted in the summary: First, that policymakers will be "frustrated with the slow pace of change"; second, states and districts will have to invest in helping teachers and school principals to do their work in different and more effective ways.

Financing Incentive Programs

Are states funding incentive programs?

Incentive program funding during 1989-90 and 1990-91 followed patterns similar to those of the last few years. Statewide programs that have received substantial funding in the past experienced similar or increased levels of support. In California, the Mentor Teacher Program has a $66.7 million budget, and over 10,000 participants—up from 2,100 eight years ago. Teachers who participate receive about $4,300 in additional pay. The Texas Career Ladder Program increased funding in 1989 from $70 to $90 per student and now invests over

300 million state dollars in the program each year. In Missouri, career ladder funding from the state (districts also provide funding) increased from $13 million in 1989-90 to $17.5 million for 1990-91. About 8,000 Missouri educators are participating in the program—nearly four times as many as in 1986-87.

South Carolina puts $27.4 million into its three incentive programs, up slightly from one year ago. In Tennessee, the career ladder program received $89 million with an additional $15 million for retirement benefits; 99 percent of all eligible educators are on the career ladder; 28 percent of those eligible are on the upper levels. Utah has funded its program at $41 million for the past few years. A request for an additional $6.7 million per year over three years has been made to the legislature. Pennsylvania continues to put $5 million into its school incentive program. Indiana funded a school incentive program (based on student improvement) in 1989-90 at $10 million. Another $10 million is to go to schools during 1990-91 and an additional $10 million has been requested for a third year. Texas just paid, for the first time, $7.7 million to schools that met excellence standards. Florida continued to fund two incentive programs for a total of $13 million.

North Carolina decreased its funding for its career development program from $46 million to $38 million, but actually increased overall funding for incentive programs to $77 million—including $39 million for differentiated pay plans created in1989 legislation—despite the state's current economic slowdown.

The Arizona legislature passed a law in 1990 to expand its pilot career ladder project to full implementation. In 1989-90, the cost was $18.4 million (based on student count and the numbers of teachers moving up the ladder). In 1990-91, the cost will rise to about $20 million. Arizona is the only state to tie career ladder funding to a requirement that each district develop a completely new structure for teacher compensation.

Idaho is now fully implementing its mentor teacher program, providing $1,000 for each new teacher in a district. Michigan provided $2.4 million for school improvement plans that can include teacher incentives. The New York mentor teacher program's funding increased from $12.5 to $16.5 million. Ohio is providing $2.08 million to support pilot incentive projects in Toledo and Columbus.

West Virginia is providing $2 million in new funding for professional development programs for teachers and $1.5 million for a mentor program for beginning teachers. Mentor teachers will receive $600 in additional pay. Montana has requested funds for mentor teacher programs, and Wisconsin has requested funding for a beginning teacher program. Washington has expanded its innovative grants program, and Oregon's pilot Professional Development in School Improvement Plan will receive $4.6 million for 1989-91, up from $2.4 million in 1987-89.

The Master Plan for Tennessee Schools, adopted by the State Board of Education in November 1990, calls for additional funding of $5 million in 1991-92 to create a professional development program. The funding would increase to $23 million in five years. The report endorsed making the "improvement of teaching a primary goal of the career ladder program

by linking career ladder teacher evaluations to staff development." Another proposal includes state funding for induction programs for beginning teachers. When fully implemented, the cost would be $5 million.

In a pattern typical of the past few years, certain statewide programs that never received funding or received minimal amounts still have no funding and, in fact, appear to have little support for moving forward. Georgia is the leading example. Nebraska, which had never implemented its 1984 career ladder plan, removed the law from the statute books.

Colorado, Ohio, and South Dakota are now discussing the feasibility of developing incentive programs at the state level —in contrast to earlier recommendations that local districts should take the initiative.

A 1987 study in Ohio recommended that local districts develop incentive programs with state assistance and guidelines. The 1989 legislature authorized the Department of Education to develop a plan to phase in statewide merit pay and career ladder programs. In 1986, South Dakota created an induction program with state funding. Funding was discontinued in 1988-89, but local districts could maintain or initiate programs. A 1990 "ad hoc" committee has recommended to the State Board of Education that it implement an incentive program for career teachers to assist first-year teachers. The Department of Education has budgeted $150,000 to begin with 150 career teachers. In 1987 in Colorado, pilot studies led to the recommendation that statewide incentives were not feasible. In 1990, the Colorado legislature created the Teacher Employment and Compensation Committee and directed it to study the relationship of performance to compensation.

With the exception of a few states, the proportion of state funding for teacher salaries that is paid through incentive programs is relatively small. For instance, in North Carolina, the money now going to teachers through the differentiated pay plans will be 2 percent in 1990-91 and will rise to 7 percent in 1994-95. In South Carolina, 1984 estimates called for a $70 million investment in teacher incentive awards over a five-year period, but only about $21 million was spent. The cost of funding teacher salaries in South Carolina at the Southeastern average was originally estimated to be $307 million over that same five-year period, but instead cost $468 million.

Evaluation of Programs

What has changed in schools because of these incentive programs?

Few comprehensive evaluations of career ladder programs have been undertaken. For an evaluation to be comprehensive, it should examine a program's effects on student attitude and achievement and on attracting and training quality teachers. However, less comprehensive short- and long-term looks at programs continue to point to the complexity and difficulty in changing schools and the tendency to expect instant results.

Earlier annual reports from the SREB Career Ladder Clearinghouse have highlighted the program evaluations conducted in states such as Arizona, North Carolina, and Utah. Many states have made decisions on whether to fund or to change programs without sufficient evidence.

One state, Arizona, has extensive information on its program. In establishing the pilot career ladder program, the Arizona legislature mandated an extensive evaluation of its effects over the life of the pilot projects. The research results led the legislature to expand the project in the state. The five-year research and evaluation project found that despite the "diversity of participating districts and researchers," the program has had a positve effect on student achievement in the districts participating in the program. The study reported that:

- Students taught by career ladder teachers are making significant gains on achievement (outpacing those taught by non-career ladder teachers).

- Student achievement depends more on teacher performance than years of experience in the classroom.

- Districts in the Career Ladder Project report that, due to their participation in the project, they have:

  —better alignment of curriculum;

  —teachers setting higher level learning objectives;

  —administrators who are more involved in day-to-day classroom teaching;

  —better communication and sharing among teachers;

  —more locally developed learning methods and materials;

  —greater opportunities for teachers to participate in in-service and peer coaching (teachers not in the program still randomly accumulate college and in-service credits);

  —an increased number of "teacher leaders" in the districts.

The pilot project also provided the state with information on ways to change and improve the program. Because districts vary in their readiness to implement changes needed in a new program of this type, there have been difficulties in assuring that all districts adhere to a fixed time schedule or mandated guidelines. Many districts cannot show the effects of the program on student achievement because they have not established a valid curriculum and evaluation process (Packard & Dereshiwsky, January 1990).

South Carolina has commissioned studies of its incentive programs. The report of the final pilot year of the Principal Incentive Program (1988-89) has been completed (MGT, 1990). Results focused on surveys of teachers and showed that schools where principals received incentive rewards were more likely to receive a higher effectiveness rating. Schools where

the principal won a principal incentive award were also more likely to win a school incentive award. However, only 54 percent of the superintendents and 42 percent of the principals who participated in the program believed that the requirements to receive an award encouraged superior performance among principals. A majority of the superintendents believed that principals' participation did have a positive effect on leadership ability and administrative skills.

A lengthy study of pilot incentive projects designed to attract and retain teachers provided several recommendations about the district-designed programs. First, the study supported state-level planning and funding of beginning teacher programs. Secondly, it was recommended that career ladder programs (one district had piloted a career ladder plan) do not benefit from state direction because "the career needs of teachers vary from district to district." Career ladder programs, the researchers said, should only be developed where sufficient interest is evident. The study recommended that incentive programs be based on locally derived problems with teachers involved in planning, and that a variety of incentives should be available (Lind & Popkewitz, no date).

An extensive third party validation study was recently completed on the Tennessee career ladder evaluation system (Baker, et.al., 1990). This study was mandated by legislation to insure that educators in the program were receiving fair and objective assessments of their competency. The study found:

- Sound procedures were used to identify the domain and competencies that are assessed.

- The competencies and indicators are based on effective teaching results and consensus by Tennessee teachers.

- Procedures for selecting evaluators is sound and training adequate.

- A higher proportion of black teachers were employed at Career Level I than would be expected, and a lower proportion at Levels II and III. Female teachers reached Level III at a greater success rate than did male teachers. The percentage of teachers reaching the higher levels did not vary by region of the state, but did vary on per capita income of the county (the higher per capita income, the greater the percentage of teachers on upper levels.) The report indicated that further study was necessary to delve into reasons for these findings.

- Teachers that have been recognized as outstanding on other measures (i.e. awards) are more likely to apply for the upper levels of the ladder and are more likely to achieve career level status. According to the researchers, this was one indicator that the system is valid for determining excellence.

- The study concludes that "the staff has done a stellar job of conceptualizing, developing, and implementing a model teacher evaluation system that allows for valid inferences for teaching quality."

Richard Brandt's book *Incentive Pay and Career Ladders for Today's Teachers* (1990) is one of the most exhaustive looks at state-supported teacher incentive programs developed and put into place during the 1980s. The following are his observations about changes brought about by the programs.

- *Teacher evaluation has changed. Because few systematic procedures existed, evaluation schemes were developed not only to help teachers, but to make decisions about performance. Systems became more complex and many relied on data from multiple sources.* He notes that "comprehensive summative evaluation of teaching adds needed rigor and objectivity to the assessment process which cannot help but improve teaching."

- *There are very few instances where incentive pay has been primarily dependent on student achievement.* This fact, combined with the difficulties in establishing the link between student achievement gains in programs, leads to Brandt's conclusion that more substantial data are needed to determine the effects on student achievement.

- *Principals are spending more time in the classroom dealing with instruction; some teachers are taking on new roles that expand their responsibility beyond their own classroom; and the teacher is no longer teaching behind the door because of expectations and monitoring in some programs.*

- *Programs have caused more differentiation in pay among teachers in a district.* Overall teacher pay has increased because many state incentive plans were linked to across the board raises for teachers. He notes that additional pay is generally an add-on and programs are vulnerable to cuts.

- *Teacher attitudes have often initially been negative, but attitudes have become more positive where programs are seen to have been well implemented.*

- *Teachers are most hostile to programs that are performance-based and highly selective.* More pay for more work is supported as long as it is not limited to a few teachers.

Outlook for Incentive Programs

A comprehensive evaluation of incentive programs is still needed

Over the past year, national and state initiatives have continued to focus on the importance of results in education. Legislators and policymakers want to know about outcomes—what taxpayers are getting in return for their investment in the education of children and young adults.

State actions indicate that funding is being directed into programs that reward schools that have improved student achievement, have fewer absences, and have more students staying in school. States are providing money for incentives to reward teachers who are doing

a better job or who are willing to take on more work within the school. Beginning teacher programs—especially those that provide additional pay for mentor teachers—are growing. Other states are increasing funding for the professional development of teachers.

Seven years after the implementation of the first of these incentive programs, important questions still need answers:

- Are students learning more?
- Have these programs changed schools?
- Have these programs made teaching more attractive?

Budgets in 1990 and 1991 are facing shortfalls in many states. The tight budget situation is one more reason why states need to support efforts to better understand what is working in education and what is not. Scarce resources should be directed to programs that promote better teaching and improve education for all children.

While comprehensive evaluations of programs show positive results—including improvements in student achievement and changes in how districts involve teachers in improving curriculum and instruction—they also reveal problems. In many school districts, the existing organizational structure may prevent real change from occurring. Incentive programs that focus on individual performance or elevate the status of one teacher over another continue to meet with resistance. Linking rewards for individual teachers to student achievement is problematic and has received little attention. Programs that provide extra pay for extra work or focus on school-wide rather than individual incentives are increasingly popular. These programs are less costly, can be put into place more quickly, and do not require fundamental changes in how teachers and principals go about their work.

Clearly, states and school districts will continue to focus on programs that link rewards to the performance of teachers and students. District educational leaders, including teachers, must continue to use their expertise and knowledge to find the best ways to deliver instruction and be accountable for performance of their students. State leaders must call for more comprehensive evaluations of incentive programs and provide funding over an extended period of time to allow programs to show results. However, no program should be continued without evidence that it is producing the intended changes.

What lessons can we learn from seven years of experimentation with career ladder and incentive programs? These programs can begin to change the way we think about schools and about rewards for student results. They have helped principals focus on what goes on in classrooms. They have begun to involve teachers in evaluating and coaching their peers, and they have made it possible for teachers to try out important new roles in schools. They have shown that real change can occur, but it takes time and very hard work. Teachers and school leaders must be willing to share good ideas and find better ways to improve schools. State leaders must forge policies that make it clear that all must be involved and accountable if progress is to be made toward state and national goals.

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INCENTIVE PROGRAMS — 1990

	Local Initiative	Pilots with State Funding and/or Assistance	Full Implementation of State Program	State Program Under Development	Discussion No Legislative Action Pending	Type of Program
Alabama						
Alaska	X					Teacher Incentive
Arizona			X			Career Ladder
Arkansas						
California			X			Mentor Teacher
Colorado		X(1)		X(2) (Not funded)		(1) Teacher Incentive (2) Teacher/School Incentive
Connecticut			X(1)	X(2)		(1) Mentor Teacher (2) Career Development
Delaware						
Florida			X			School Incentive (2 Programs)
Georgia				X (Not funded)		Career Ladder
Hawaii				X		Mentor Teacher
Idaho			X(1)	X(2)		(1) Mentor Teacher (2) Career Compensation
Illinois	X					Teacher Incentive
Indiana	X(1)		X(2) X(3)			(1) Career Ladder/ Development (2) Mentor Teacher (3) School Incentive
Iowa			X			Teacher Incentive/ School Transformation
Kansas	X					Teacher Incentive
Kentucky				X		School Incentive
Louisiana		X(1)		X(2)		(1) Career Options (2) School Incentive
Maine			X			Tiered Certification
Maryland	X					Career Development Incentive
Massachusetts			X(1)	X(2)		(1) Teacher Incentive (2) Mentor Teacher
Michigan	X					Teacher Incentive
Minnesota	X(1)	X(2)				(1) Teacher Incentive (2) Mentor Teacher
Mississippi				X (Not funded)		School Incentive
Missouri			X			Career Ladder
Montana	X(1)				X(2)	(1) Teacher Incentive (2) Mentor Teacher
Nebraska						
Nevada	X					Teacher Incentive
New Hampshire	X					Teacher Incentive
New Jersey			X			Teacher Incentive
New Mexico					X	Teacher Incentive
New York		X(1) X(2)	X(3)			(1) District/School Incentive (2) Mentor Teacher (3) Teacher Incentive
North Carolina			X			Career Ladder/ Differentiated Pay
North Dakota	X				X	Career Development
Ohio		X		X		Career Ladder
Oklahoma				X		Teacher Incentive
Oregon		X				Career Development Mentor Teacher
Pennsylvania			X(1) X(2) X(3)			(1) Career Development (2) Mentor Teacher (3) School Incentive
Rhode Island					X	Mentor Teacher
South Carolina			X(1) X(2) X(3)			(1) Teacher Incentive (2) Principal Incentive (3) School Incentive
South Dakota	X			X		Mentor Teacher
Tennessee			X			Career Ladder
Texas			X(1) X(2)			(1) Career Ladder (2) School Incentive
Utah			X			Career Ladder
Vermont						
Virginia	X					Career Ladder/ Teacher Incentive
Washington		X(1)	X(2)			(1) School Incentive (2) Mentor Teacher
West Virginia				X		Mentor Teacher
Wisconsin	X(1)(2)				X(1)	(1) Mentor Teacher (2) Teacher Incentive
Wyoming	X					Career Ladder/ Teacher Incentive

Southern Regional Education Board

SURVEY OF STATE ACTIONS

Alabama

In 1988, the Alabama State Board of Education adopted a resolution that requires each local board of education to develop an evaluation system or adopt the State Department of Education system for professional education personnel. The locally developed evaluation system must be based upon research-based criteria established by the State Board of Education. A task force has developed competencies and indicators to be used in evaluating teachers and administrators. Personnel in specialty areas, such as counselors, speech pathologists, and library media specialists, have been included. Procedures to be used by districts in developing and implementing local systems, based on the competencies, have been completed. The State Department of Education has conducted workshop sessions for school district personnel who are working on local systems to provide information for the design of the State Department of Education's system. During the 1990-91 school year, evaluation systems for administrators will be field-tested, with training in the summer of 1991. The implementation date for all evaluation systems is the 1992-93 year. Until the new system is in place, each local board of education is required to continue its current evaluation system.

The Alabama Performance-Based Career Incentive Program was established in 1985 legislation and called for two phases: Phase I--development and implementation of an evaluation system; and Phase II--a career ladder plan. Because of controversy over the evaluation system and budget constraints, the legislature repealed the program in 1988, thus discontinuing the process for statewide evaluation procedures. The career ladder part of the plan, Phase II, was never implemented.

Alaska

Alaska has no statewide career ladder program. Local districts, however, have the authority to establish such programs. State support has been minimal due to economic limitations.

Alaska is continuing the federally funded Teacher Incentive Grant Program that is aimed at increasing student achievement; $50,000 is available for the program. Approximately one-quarter of the grants available in 1990-91 are directed toward this year's identified education priority area--kindergarten through third grade. The balance of the grants will support educational projects for all grade levels. Projects must include quality student involvement and have potential use by other teachers. While most grants awarded are in the range of $1,000 or less, a few are for up to $2,000.

Arkansas

Over the past year an indicators system has been developed to provide information about the performance of school districts and schools. The legislation, known as the *School Report Cards Act,* was passed during the 1989 legislative session. An Office of Accountability, established within the Department of Education, has just issued an annual report.

The governor's earlier proposal, *Moving Arkansas Forward into the 21st Century*, called for raising teacher salaries, establishing a uniform minimum teacher salary structure, and funding incentives or career development opportunities for teachers. The report recommended that once districts have complied with a minimum salary schedule, they design performance-based systems. Special consideration should be given to plans that are tied to improvement in student performance, according to the recommendations.

The report recommended grants to help schools plan school-wide restructuring that would include redefining teacher roles and responsibilities by providing career options, such as serving as mentor teachers or leaders in curriculum development.

In December 1987, the governor challenged 15 schools to go beyond the minimum standards. These 15 schools had fully met the spirit, not just the letter of the new education Standards for Accreditation that had been established in 1983.

Arkansas wanted to create an atmosphere that encouraged innovation and experimentation. The 15 schools were encouraged to seek waivers and deregulations from policy that might impede progress. Requests had to be accompanied by a full explanation for the need for that flexibility and willingness for an equal amount of accountability. Schools have received waivers from state regulations to help them create an environment that fosters competition, the kind conducive to consistent progress. Deregulation governing certification, time for staff planning and development, scheduling, and instructional methods are among those that have been received.

Arizona

Legislation passed from 1984 through 1988 established a five-year career ladder pilot program and authorized a Joint Legislative Committee to be involved with the approval and monitoring of pilot districts. The locally designed pilot programs were developed in consultation with teachers. Criteria for the projects included procedures that stressed assessment of teacher performance, a compensation system based completely on a restructured salary schedule rather than merit raises on top of a base salary schedule, evidence of teacher support, and a way to evaluate student achievement. Fourteen districts have taken part since 1985. In 1988-89, funding for the program was $13.8 million. The estimated cost for 1989-90 was $18.4 million and for 1990-91 is $20 million. Funds are provided through a formula based on student count and planned annual percentage increases during the first few years of the program to cover higher participation rates and the increased cost of teachers moving up the ladder.

As a result of gains in student achievement within the pilot districts, the legislature passed a law in 1990 to expand the program from its pilot stage. This statewide project will add seven new districts beginning in 1992-93. During the current year, the original 14 districts will seek reapproval of their projects, with the more "mature" projects receiving approval for up to five years. Oversight will shift from the legislature to the State Board of Education, and a statewide advisory committee consisting of legislators, personnel from the original pilot districts, and community members will be formed. Based on findings from the pilot project,

program requirements for new districts will contain additions to the pilot guidelines--all teachers new to a district will be required to participate, differentiated evaluation criteria will be developed for various levels of the ladder, multiple evaluators will be used, and teachers reaching the top rungs of the ladder will be required to take on additional instructional responsibilities. In addition, district readiness to implement a career ladder program will be used as a part of the approval process. The new guidelines will not be required for the original pilot districts; however, incentives will be available for those districts that incorporate the new ideas.

California

The California Mentor Teacher Program, created in 1983, is intended to upgrade the skills of experienced as well as new teachers. The retention of exemplary teachers is encouraged through the selection of "mentor teachers," who are designated to spend part of their time working with new and experienced teachers. The program provides incentives to the mentors, who are selected by committees composed mainly of teachers, to encourage them to remain in the classroom. Participating teachers work together on common instructional issues and assist one another in promoting student learning and school improvement, and in raising the status of the teaching profession.

The program has grown steadily from 2,188 mentor teachers participating eight years ago to more than 10,000 in 1989. The 1990-91 budget of $66.7 million will support about 10,100 mentor teachers. Funding will provide each mentor with a stipend of $4,385. Additionally, districts receive allocations to offset the costs of mentor selection and training, and for release time so that the mentor can work with other teachers.

The legislation that established the program allows districts broad latitude in designing, implementing, and evaluating their individual mentor programs. Districts are planning the future direction of their mentor programs as part of a larger strategy for building teacher leadership and responsibility, and for supporting curriculum improvement and staff training.

Colorado

As a part of the Educational Quality Act of 1985, 20 pilot projects were given support to research and test the value of innovative teaching programs. The projects addressed such issues as career ladders, mentor teacher programs, career enrichment, and performance incentives. The Department of Education's final report on the program in August 1987 concluded that a statewide approach to the issue of incentives was not feasible. It recommended that the state should coordinate the development of guidelines that would allow for local district teacher recognition and compensation programs.

During the 1988 session, legislation passed that allowed local districts to design and implement pilot alternative salary policies. The Department of Education is responsible for reviewing pilot proposals submitted by the districts and providing assistance to districts implementing pilot programs. No state funds have been provided for this purpose--districts

participating must finance the alternative salary policies from existing operating funds. No districts have submitted proposals.

Another program established by the 1988 legislature is the Excellent Schools Program, the purpose of which is to provide financial awards to personnel, schools, and districts that demonstrate outstanding performance in achieving established goals. No state funds were appropriated for the program; however, the Department of Education was authorized to receive contributions to fund the financial awards. The State Board of Education has adopted standards for the awards and contributions can now be accepted.

Legislation in 1990 created the Teacher Employment and Compensation Committee to study employment and compensation issues, particularly the relationship of performance to compensation. The committee's report, including recommendations for legislation, was to be presented in December 1990.

Connecticut

In January 1987, the governor signed into law legislation that addressed increases in minimum salaries for teachers (to $20,000), professional development, teacher evaluation, and teacher career incentives programs. Under this law, the Connecticut Department of Education provided grants to assist local and regional boards of education and regional educational service centers in developing new or revising existing teacher evaluation programs. Grants were also provided to plan teacher career incentive programs. The development of career incentive programs could include compensation related to factors other than seniority and academic degree; the naming of mentor and cooperating teachers; a career advancement ladder; and the consideration of performance, experience, job-related education, and advanced academic training.

The teacher evaluation and the career incentives development programs each received $1 million in state funding for planning grants to be made either in 1987-88 or 1988-89 (districts could apply for funds in one year or the other, but not both). Additionally, $3 million was provided for the implementation of teacher evaluation programs in 1988-89. Due to fiscal constraints, the legislature did not fund the Department of Education's request for $3 million in teacher evaluation implementation funds in 1989-90. However, $1 million was provided for professional development grants--districts continuing their programs did so through this grant program and local funding.

To further the integration of professional development and teacher evaluation, the 1990 Connecticut General Assembly passed legislation that requires each local school district to create a three-year Comprehensive Professional Development Plan by April 1, 1991. The purpose of the plan is to provide the ongoing mechanism for each board to identify and address the professional development and teacher evaluation needs of its professional staff. Thirteen guidelines for professional development and 19 guidelines for teacher evaluation have been adopted by the State Board of Education to assist districts in developing comprehensive professional development plans.

The $8 million Beginning Educator Support and Training (BEST) program is in its second year after three years of development and field-testing. About 1,200 beginning teachers, who are paired with trained mentor teachers, will be evaluated six times during this year.

Delaware

Early efforts in Delaware focused on career ladder and other incentive programs. Funds were appropriated in 1985 for the development and implementation of a career ladder program. When agreement on a program could not be reached, the funds were used to develop teacher training models and to implement a statewide appraisal system. The focus then turned to professional development for teachers and principals. Teachers are trained in the elements of effective teaching; principals, in supervision and evaluation fundamentals and in the elements of effective schools. A statewide policy for appraising school-level administrators was adopted by the State Board of Education in July 1990.

Florida

The 1990 session in Florida brought changes to incentive programs for schools. The total funding for school incentive programs in 1990-91 was set at $20 million, but has now been reduced to $13 million because of budget reductions. In 1990-91, $3 million will go to the High School Accountability Program, which was created in 1989 to reward schools that increase graduation rates, lower dropout rates, and reduce the number of graduates who are placed in remedial programs in postsecondary education institutions. Schools set goals, establish indicators to mark progress, and receive money for meeting them. The funds are to be used by the school "to improve productivity, including improvement of student outcomes." Schools are challenged to form partnerships with the community, business leaders, and parents to meet the student outcome indicators. In 1989-90, this program, which was funded at $10 million, awarded grants of $10,000 to $40,000 based on the number of indicators met by the schools; 68 high schools in 17 districts participated.

The five-year-old District Quality Instruction Incentives Program, in which districts designed programs to reward school employees, was discontinued; the $10 million will now reward districts for enrolling students in higher levels of science and mathematics courses.

In 1990-91, 17 school districts and 52 schools within the districts are participating in still another effort—School Improvement Programs. These are partnerships in which State Department of Education personnel work with district persons, including school board members. They develop school improvement plans to reach one of four goals that include getting children ready for school, increasing graduation rates, improving the quality of staff, and increasing student achievement. Schools receive $10 per FTE, with awards ranging from $4,000 to $12,000 per school.

At the district level, the 1986 contract of the United Teachers of Dade and the Miami-Dade County School District contained provisions for Professionalization of the Teaching

Force, which included a career ladder plan, special assignments for teachers, and a teacher recruitment and intern plan. The contract was part of the continuing emphasis begun by the district in 1974 to move to school-based management and shared decision making at the school level. The five-year district project, School-Based Management/Shared Decision Making is "more than just budget decentralization." It includes curriculum planning and colleague decision making. In the 1970s, state legislation established the school as the unit of accountability, provided for training of principals as school-based managers, and appropriated funds for the study of school-based management. The pilot program in Dade County does not depend on additional funding. Each school receives a lump sum of about $3,400 per student. The teachers' union and the school board have agreed to waive district rules or contract regulations, if necessary.

Georgia

The Career Ladder Program, developed in response to 1985 legislation, was piloted in five systems during the 1988-89 school year. In its August 1989 meeting, the State Board of Education approved policy formally establishing the Georgia Career Ladder Program, subject to available money. Funding for implementation in approximately 32 school systems was sought from the 1990 General Assembly. No funds were appropriated.

In addition, no funds were appropriated for the Group Productivity Program, which will pay supplements to entire faculties if student achievement in the school or school system exceeds what would be expected when socioeconomic characteristics of students are taken into account. The program is designed to reward cooperation among staff for effective instruction. Awards range from $125 to $600; certified staff and instructional aides in schools and each central office are included.

The Georgia Career Ladder Program for Teachers provides for a three-year appraisal in four areas:

- Classroom performance, in terms of the teacher's on-the job performance as professional;
- Teacher productivity, in terms of academic achievement of students;
- Professional service, such as professional activities that help other educators;
- Professional growth, a teacher's own efforts to personally improve as an educator.

Teachers who volunteer to be appraised design a three-year Professional Development Plan that is reviewed for approval by a district-wide review team comprised of teachers and others. Successful appraisal results in a three-year promotion that establishes the teacher's eligibility for an incentive award and the opportunity to add days to the standard 190-day contract. Days may be added if the teacher engages in approved extra duties and responsibilities.

The program has several features. First, the amount of funding that a participating school system receives for career ladder supplements is based to a large degree on the productivity of the school system as measured by the Georgia Statewide Testing Program after adjustment for socioeconomic factors known to affect student test performance. Second, the selection of teachers is not restricted by a quota or limit, but is based on performance standards or anchors established in the plan approved by the local school system. Systems must give career ladder status and incentive awards to all teachers who volunteer for appraisal and who qualify for career ladder status. Third, the level of supplement is based on the salary increase necessary to make mid-career teacher salaries comparable to those of mid-career professionals in professions/occupations with similar entry requirements. For instance, an experienced teacher at the top level of the career ladder who works a 230-day contract could earn a supplement of $18,500 based on a 1989 salary analysis of salaries for such non-education jobs as accountant or software programmer.

Hawaii

A number of programs implemented in Hawaii have offered incentives for teachers and school administrators. The alternative certification program, originally limited to mathematics and science, has been extended to address teacher shortages in counseling, special education, and school library services. This program allows current teachers as well as persons with undergraduate degrees in the shortage areas to seek certification in those areas.

The State Department of Education is submitting to the legislaturea budget request for the 1991-93 biennium to initiate a statewide program based on mentor teacher programs in several districts. As a measure to support and retain new teachers, the Department will request about $2.5 million for support personnel and training for beginning teachers. A $2.5 million proposal to establish professional development schools to simultaneously strengthen pre-service teacher education programs and school renewal is also part of the biennial budget request.

Other initiatives that encourage professional growth include staff development programs for teachers and administrators funded at nearly $2.5 million. The appropriated funds are prorated to districts based upon teacher units; individual schools then submit development plans to the districts for funding. An education-business partnership effort places teachers and school administrators in four-week to six-week summer internships at local businesses where they can acquire new job perspectives and skills in planning, staff development, and community relations. The interns are paid between $1,000 and $1,500 by the businesses for their participation. In June 1990, a federally funded summer internship program was implemented. School administrators and teachers were assigned to state and district offices for six weeks to receive work experience in such areas as curriculum and instructional services, personnel services, business services, planning, and public relations. Participants were paid $2,000.

A new school administration training program, the Cohort School Leadership Program, was implemented in September 1990. Forty teachers were placed in a one-year, on-the-job school administration intern program. Course credit requirements will be completed during

the internship and participants will be given the opportunity to earn a master's degree in Educational Administration. The program emphasizes field-based learning and uses a case or clinical studies approach.

Idaho

Legislation enacted in 1984 permitted school districts to participate in the Teacher Excellence Program; $100,000 was appropriated for administration and assistance to local districts in developing career compensation plans in the 1985 fiscal year, with the expectation that these plans would be implemented during the following year. While the 1985 legislature did not appropriate the funding for local career compensation plans due to economic considerations, $90,000 was provided to the State Department of Education to continue a local district assistance program, with a verbal commitment to address the career ladder issue in upcoming legislative sessions.

The 1989 legislature did address the issue by appropriating a one-time $3 million for programs that attract and retain quality teachers. The funds were to be used to support a minimum teacher salary of $16,000, to implement career compensation plans developed as a result of the 1985 funding, and for the development and implementation of compensation plans in those districts that do not currently have such plans. Because the salaries of so many teachers fell below the $16,000 minimum, the funding was used to raise salaries. Approximately 25 of the state's 113 school districts developed career compensation plans after the legislature's actions in 1985; however, no other districts have submitted plans to the Department of Education for approval.

Funding for the educator mentor program continues to be provided. Districts receive $1,000 for each first-year certified person employed.

Illinois

The Education Reform Act of 1986 authorized the establishment of a Center for Excellence in Teaching within the State Board of Education to conduct a study of teacher career compensation programs based on merit. The State Board of Education was authorized to fund five to seven pilot programs in local districts; $1 million was allocated for the implementation phase during 1986-87.

The pilot programs were designed to identify, from an array of various types, compensation programs that the General Assembly might then extend on a statewide basis. Proposals were solicited from all Illinois school districts; 30 proposals were received, all of which were developed by the school districts in conjunction with their teachers and a participating university. In March 1986, seven districts, representing a diverse collection of sizes and types and with programs offering a variety of approaches to the compensation issue, were awarded grants to continue developing plans for implementation. Funding for the pilots was scaled down in 1987-88--the $800,000 provided supported the continuation of five of the pilots. The same five continued during 1988-89 with $600,000. No further funding has been

provided; however, the State Department of Education is planning to share the results of the projects so that local districts can incorporate them into their own initiatives.

Indiana

A plan was developed in response to 1985 legislation requiring the State Department of Education to determine the feasibility of a career ladder plan and to develop methods to honor, recognize, and provide professional growth for teachers. The four-year Teacher Quality and Professional Improvement Program, completed in June, involved pilot projects primarily in career ladder and career development areas. Of the 181 pilot projects, 158 were funded under career development, 9 under career ladder, and 14 in other areas. Following the pilot projects, the Department concluded that local districts should be encouraged to develop and implement career ladder and career development programs based upon their individual needs.

Beginning in 1988-89, all districts were required to have a mentor teacher program in which new teachers participate as a condition for certification. For both 1989-90 and 1990-91, $2 million was appropriated to support the program. From these funds, mentor teachers are paid $600 per year and the districts receive $200 per mentor to provide release time.

Indiana has initiated a school incentive program authorized by the legislature in 1987. Schools receive cash awards for student improvement in at least two of four areas (performance on the state progress exam, language arts test scores, mathematics scores, and attendance rates.) The 1988-89 appropriation of $10 million was distributed in the 1989-90 school year. The second $10 million appropriation is being distributed in 1990-91. The Department of Education is requesting another $10 million for the third year of awards. The State Board of Education is proposing that schools with traditionally high levels of success be eligible for awards for continuing that level of success.

Other initiatives that the State Board of Education is submitting for consideration by the 1991 legislature include providing teachers with additional time for professional development, increasing pilot school improvement projects, and creating an alternative certification program for potential teachers.

Iowa

Legislation enacted in 1987 established the Educational Excellence Program, which consists of three major phases that address recruiting quality teachers, retaining quality teachers, and improving the quality, effectiveness, and performance of teachers. The Educational Excellence Program is funded annually at $91 million.

Phase I, which is funded at $11 million, establishes a minimum teacher salary of $18,000 for all full-time teachers. Phase II, with $38 million in funding, improves salaries of experienced teachers. Phase III promotes excellence through the development of performance pay plans and supplemental pay plans based on additional work assignments or

specialized training. A 1990 amendment to the Phase III program allows districts and Area Education Agencies (AEAs) to provide salary increases for teachers who work to restructure schools (comprehensive school transformation). Phase III is funded at $41 million.

To receive the Phase III allocation, school districts and AEAs annually develop plans based on identified needs and goals. Each year, expenditures and progress made toward goals are reported. The most common goals in 1988-89 were to develop or revise curriculum, improve student academic performance, provide staff development for teachers, and provide students with additional educational opportunities.

In 1990-91, 300 districts (70 percent of those applying) submitted applications that included performance-based pay. This compares to 53 districts (12 percent) in 1987-88, the initial year of Phase III implementation.

Kansas

The Kansas State Board of Education and the legislature have adopted the position that teacher incentive programs should be developed and funded at the local level. A pilot internship program designed to improve the quality of teachers entering the profession was funded at $225,000 in 1988. No state funding has been provided since 1988-89.

Kentucky

Comprehensive legislation passed by the 1990 Kentucky General Assembly calls for measurable goals for schools that "define the outcomes expected of students." The intent of the law is that "schools succeed with all students" and provide for rewards for schools that show improvement over a two-year period. Increasing achievement, developing skills in communications and mathematics, being able to make a successful transition to work, reducing dropout rates, and becoming problem solvers are among outcomes for students. The State Board of Education will set standards for schools, taking into account the proportion of students who are already successful in the school. Measurable outcomes for goals and assessments that will include performance outcomes for students are being developed. Baseline assessments will be established in 1992. Rewards will go to each individual school when gains are made. It is expected that the first awards will be made in 1994. School staff will decide how the reward funds will be spent, but bonuses will not be added to base salary. Schools that do not reach threshold levels of performance will be required to develop school improvement plans and, ultimately, staff can be declared "in crisis" and placed on probation. Parents can choose to transfer students to successful schools.

The legislation also called for Kentucky "Distinguished Educators" to be chosen to assist the State Department of Education with projects and work with schools in crisis. When assigned to work with unsuccessful schools, the educators will receive a salary supplement of 50 percent of their annual salary. The Kentucky Professional Compensation Plan is to be developed and implemented in 1992-93. The plan is to have advancement opportunities based on professional skills and include education, rank, years of service, length of work year, and performance. The law also calls for school-based decision making. Every district is to

have at least one school with school-based decision making by the 1991-92 school year; all schools must have school-site management in place by 1996.

Louisiana

Louisiana's 1988 legislation, the "Children First" education reform package, called for two incentive programs--the School Profile and Incentive Program and the Model Career Options package. Data collection for the School Progress Profiles began with the 1989-90 school year, and the first profile report for each school and district has been issued. The School Incentive Program is under development. The Model Career Options Program is being piloted for two years and will be implemented in the 1991-92 school year.

These programs are part of a package that raised teacher salaries, extended the state salary schedule to include 25 years of experience, and established evaluation procedures for the performance of teachers as a part of continuing certification.

The School Profile and Incentive Program (funded at $2.1 million in 1990-91) called for the creation of profiles of schools. The profiles, approved by the Board of Education, will be prepared annually on every school and school system. The school reports are prepared for parents and the public and include information on test results, class size, faculty qualifications, student dropouts, attendance, and suspensions.

The School Incentive Program (funded at $200,000 in 1990-91 for development) is designed to reward schools making significant progress and to increase local accountability. At least 100 schools will be initially identified as having made progress. (Schools will be grouped into similar categories based on such factors as socioeconomic status of students, size of school, and urban or suburban location.) The cash awards will be used for instruction, not to increase salaries. School councils of teachers, community members, and students will assist the principals in determining use of the award.

The Model Career Options pilot program provides teachers with salary bonuses for performance and advancement and opportunities to take on new and expanded responsibilities, as well as providing districts with additional services using talented teachers. A statewide committee developed the program. In the second year of pilot testing (1990-91), 78 participants in 62 of the state's 66 districts are receiving an average of $1,850 in additional pay. Three categories of career options are being tried--teachers working with other teachers; teachers providing instructional programs in an extended day, week, or school year; and a model for a locally developed plan. The pilot program is being evaluated by a research team so that necessary refinements can be made before full implementation in 1991-92. The program is voluntary for teachers who have seven years of experience, hold at least a master's degree, and have a superior rating under the statewide evaluation system now being implemented.

Maine

As a result of legislation adopted in 1984, a certification pilot study was conducted by 20 school districts from April 1984 through December 1986. The law established three levels of certification--a two-year provisional certificate for beginning teachers, a renewable five-year professional certificate, and a master teacher certificate. Under the law, beginning teachers serving the two-year provisional term are supervised and evaluated by support systems consisting primarily of teachers; evaluation criteria include professional classroom skills and subject matter knowledge. After successfully completing the provisional term, the teachers will be granted the professional certificate.

The State Board of Education adopted procedures for the statewide implementation of the certification program, standards for the support systems, and a process for appeals pertaining to applications for the issuance and renewal of certificates. The certification program took effect on July 1, 1988. All districts now have support systems that are providing the State Department of Education with recommendations for certification renewals.

All professional level certificate holders have the opportunity to apply for a master level certificate based on a locally developed process. Currently, there are about 130 master teachers statewide (out of a total of 12,000 teachers). Local districts determine the level of additional pay, if any, for master teachers; however, most receive no additional money. The State Board of Education is reviewing the certification program and may make recommendations for change to the 1991 legislature.

Maryland

Incentive programs for teachers and administrators are continuing at the local level. Legislation in 1984 enabled districts to receive state education aid to develop programs for improving teacher performance.

The Maryland School Performance Program is being implemented over a three-year period. The program is an accountability system using an outcomes approach. The state and local school systems have adopted outcomes and standards. The first performance report has been released for the state and school systems. Data include assessed knowledge, student attendance, and yearly dropout and promotion rates. Supporting information, such as student population characteristics, funding, and students in special programs, is also provided. Each district receives an excellent, satisfactory, or standard-not-yet-met rating in each category. Some counties also report information on students, for example, data on those enrolling in college, students completing algebra, and SAT and Advanced Placement test scores. Future reports will include additional data.

The state is developing school improvement and accreditation guidelines. The guidelines for school improvement deal with school-based plans, state and local grants, technical support, rules and regulations waiver process, network of programs that work, and parent/community involvement. Accreditation focuses on the success of the school, including

incentives and sanctions. The new guidelines for school improvement and accreditation will not be implemented until July 1992.

Massachusetts

The Public School Improvement Act of 1985 established a far-reaching program of educational reform that included several types of teacher incentive programs. The act called for a minimum teacher's salary of $18,000 and state funding to pay for some of the educational expenses of those who agree to teach within the state after their graduation. The legislation also established the "Horace Mann Teacher" designation and the Lucretia Crocker Exemplary Education Program. Under the former, the Board of Education developed guidelines for establishing programs with expanded duties for teachers, including responsibilities for training teachers, developing curricula, providing special assistance to potential dropouts, and serving as in-service instructors or consultants. Subject to collective bargaining, school committees designate the Horace Mann teachers on the basis of criteria supplied by the State Board of Education. Each school district may apply for a grant equivalent to $120 per teacher; maximum extra compensation for each Horace Mann teacher is $2,500. Legislation was passed during the 1988 session to increase these amounts, but the state's finances have not permitted the increases to take effect.

The Lucretia Crocker program was created to award teacher fellowships to disseminate information about exemplary educational programs that have been successful in advancing academic and creative achievement and creating a better school climate. Exemplary programs nominated in January 1986 were implemented in the 1990-91 fiscal year. Currently, 15 fellows are being supported with an appropriation of $487,000.

Following recommendations by the Joint Task Force on Teacher Preparation, the State Department of Education is revising certification requirements to encompass a two-stage program leading to full certification. The first stage will involve completing a bachelor's degree in liberal arts to receive a provisional certificate. The second stage will include the completion of a clinical master's degree and two years of employment under the guidance of a mentor teacher. In January 1990, the State Board of Education approved regulations to implement these requirements, which are to become effective October 1, 1994.

Michigan

Legislation passed in 1990 requires all public schools to develop and adopt three-year to five-year school improvement plans that could include teacher incentives. Schools are also required to report to the public annually on the status of the school, adopt a core curriculum, and become accredited by the State Board of Education. To support this effort in 1990-91, $2.4 million has been appropriated. Additionally, $25 per pupil is available through the finance formula for extra assistance to less wealthy districts implementing the requirements of the law.

Funds totaling $2 million are available for the second year of pilot projects designed to improve outcomes for *all* students through restructuring the organization, roles, and relationships of the school. In 1989-90, 41 pilot projects were funded with $2 million.

Minnesota

A law passed in 1987 created a teacher mentoring task force to make recommendations for a system of state and local incentives for a mentor teacher competitive grant program. For the 1987-88 biennium, $500,000 was appropriated for mentor teacher grants; 11 grants were awarded. For the 1989-91 biennium, $500,000 was again provided to continue the pilots, disseminate materials from these pilots, and provide training to other interested districts.

Mississippi

The 1990 Mississippi legislature passed a comprehensive education reform bill during its regular session; however, a special session, held a few months later, did not provide funding for the reform. The legislation--Better Education for Success Tomorrow (BEST) program--includes several incentive programs for schools. Proposed funding for the programs was about $9 million, once the programs are underway. The bills call for a Better Schools Program and a Lighthouse Schools Program.

The Better Schools Program's aim is to identify schools that improve. Schools are to be identified by performance, such as student achievement scores, dropout rates, and percent of students taking the required core curriculum to enter the colleges and universities in the state. To qualify, the students in the lowest quartile of the school must be improving. Schools may receive the designation of a "Better School" for improving or maintaining a high level of performance. The program calls for "Better Schools" to receive $1,000 for persons with certificates and $500 for other school employees. Schools that receive the "Better School" designation are eligible for a waiver of regulations on class size, length of school day and school year, and teacher qualifications. Personnel at the school will determine how the funds are to be spent. No more than 40 percent can be used for salaries and none can be spent for athletics.

The Lighthouse Schools Program is designed to reward effective techniques, to reward excellent schools, and to disseminate these findings to schools in the state. The Lighthouse Schools will be identified through measures similar to those of the Better Schools Program. Lighthouse Schools are eligible to receive $50,000 grants; the grants are not to be used for salaries.

The State Board of Education requires that all teachers who did not go through the state evaluation process must be at proficiency level or above to receive pay increases. Provisional teachers must obtain a standard certificate to qualify for future pay raises.

Missouri

In April 1986, the State Board of Education approved a career ladder model and guidelines for the development of individual district plans. The model was developed by an advisory committee appointed by the State Board as a result of a 1985 education reform act. The model consists of three stages, each of which contains a set of predetermined criteria. Both district and teacher participation is voluntary; however, should a district decide to participate, it must guarantee local funds to supplement an allocation made by the state in reaching the state-specified salary supplement levels: $1,500--Stage I; $3,000--Stage II; $5,000--Stage III. District plans must conform to the state model and guidelines.

Funding and participation has steadily increased since the program began. In 1986-87, 2,369 teachers, librarians, and counselors in 63 school districts qualified to reach Stage I. The state provided $2.6 million to support the first year of implementation. For 1987-88, $7.3 million was appropriated and about 5,000 participants in 120 school districts received salary supplements. About 6,000 participants in 150 districts were eligible to receive supplements in 1988-89, with state funding of $11.4 million. In 1989-90, 7,000 teachers, counselors, and librarians from 177 districts participated in the career ladder program at a cost to the state of $13 million. During 1990-91, 8,006 educators from 197 districts will take part in the program. State funding will increase to about $17.5 million.

Montana

During 1985-86, an experimental program was implemented to identify teachers with the potential of becoming principals and to assist these teachers in completing certification requirements. The selected teachers may act in the capacity of principal under supervision for a period of up to three years while working toward certification. A similar program was initiated in 1987-88 for those certified teachers seeking endorsement for special education. While completing the requirements, a person may teach in special education under supervision for up to one year. In 1988-89, a program for teachers interested in becoming guidance counselors was introduced.

In December 1990, the Certification Standards and Practices Advisory Council will present a request to the Board of Public Education for a pilot mentorship program in 15 locations across the state. If the Board approves the proposal, a funding request will go before the 1991 legislature.

Nebraska

Provisions for a career ladder were enacted by the legislature in 1984 as part of the governor's omnibus education improvement bill. The legislature postponed the implementation date twice. In 1987 legislation, the implementation date was removed from law and a provision was added that made initiation of the program dependent upon funding. Funding has not been provided to the State Department of Education for development and implementation of the program. The statute relating to the career ladder was repealed by the 1990 legislature.

Nevada

The Committee on School Improvement Through Incentives, in an April 1985 report directed to legislators and state and local education agency personnel, recommended that local districts be encouraged to develop various kinds of incentive programs with state funding. However, no legislation has been enacted, no funding has been provided, and there are no plans for a statewide initiative.

New Hampshire

The New Hampshire educational system is decentralized and is primarily financed with local funds. The State Board of Education has encouraged local districts to adopt compensation and incentive plans for teachers; however, any action taken is strictly a matter of local option. Currently, a few districts are experimenting with some form of incentive program. The State Board of Education is continuing to monitor their efforts.

New Jersey

A number of initiatives to improve the teaching profession continue in New Jersey. Currently, all teachers are guaranteed a minimum salary of $18,500. The Governor's Teacher Recognition Program involves an annual public ceremony for one outstanding teacher from each public school. The $1.2 million in funding provides $500 grants to each teacher's district to be expended as designated by the teacher. The Governor's Teaching Scholars Program is designed to attract 100 talented high school students annually to teaching by providing up to $30,000 in scholarship loans, which may be redeemed by teaching four years in an urban school or six years in a non-urban school. The Division of Vocational Education made $18,000 in federal vocational education funds available to award scholarships to vocational teachers and administrators so that they can attend training sessions at the Academy for the Advancement of Teaching and Management. The awards were based upon district need and potential impact upon students.

Other continuing efforts include the Commissioner's Symposium for Outstanding Teachers (100 teachers are selected to attend a three-day summer retreat to exchange ideas with other state educators), the Academy for the Advancement of Teaching and Management (trains teams of teachers and principals in proven techniques of instruction and instructional supervision), and the Minority Teacher Program (aimed toward attracting promising minority high school students into the teaching profession).

New Mexico

In 1985, the legislature requested continued study of performance-based pay systems, but declining state revenues continue to deter efforts to initiate incentive programs.

New York

The legislature has continued to fund a number of programs designed to strengthen the teaching profession. In 1990-91, an appropriation of $160 million will provide teachers with salary increases based on their length of service. The $16.5 million Mentor Teacher-Internship Program, now in its fifth year and due to be fully implemented statewide in 1993, provides first-year teachers with guidance, support, and leadership from their more experienced colleagues. Teachers and other school personnel are assisted in increasing their ability to meet the educational needs of their students through the $21.5 million teacher resource and computer training centers. The Teacher Opportunity Corps, funded at $1.73 million in its fourth year of operation, attracts potential teachers into working with "at risk" students. $4 million is available through the Empire State Challenger Scholarship and Fellowship programs for students preparing to teach in shortage areas. The Teacher Summer Business Employment program provides incentives to private employers for hiring teachers during the summer with its $5.8 million appropriation.

In 1988, the legislature created a Fund for Innovation for the elementary and secondary schools. The Fund, supported at $500,000 for the 1989-90 school year and at $1 million for the 1990-91 school year, assists school boards and teachers in the facilitation and implementation of agreements arrived at through the collective negotiations process that affect school administration--teacher cooperation, decision making, problem resolution, school bidding, participative management, new organizational structures, and staffing.

In Rochester, the Career in Teaching Program is being implemented. A 1988 career options agreement between the Rochester City School District and the Rochester Teachers' Association enables teachers to remain in the classroom and to assume different duties for part of the day. The contract increased salaries, added days to the teaching contract, moved away from a pay scale based solely on years of experience and degrees, and included school-based planning committees. The program involves four career levels and incorporates the district's Peer Assistance and Review Program, first implemented in 1986, that provides internships for new teachers and intervention to tenured teachers who need assistance. It is overseen by a joint panel of 10 members--five appointed by the teachers' organization and five by the superintendent.

The career levels are: intern, resident, professional, and lead teacher. Teachers who successfully complete their internship become residents until they are fully certified and tenured. Tenured, certified teachers are designated as "professionals"; this designation is a prerequisite for the lead teacher level. Lead teachers not only serve as mentors but also work as demonstration teachers, coordinators for staff development, heads of special projects, integrated curriculum designers, and adjunct instructors in teacher education. They are selected through a competitive process by the joint panel, must have 10 years of experience in Rochester, and must remain in teaching 60 percent of their time. Currently, 60 of the district's 2,600 teachers have been designated as lead teachers.

North Carolina

The School Improvement and Accountability Act of 1989 granted North Carolina school districts the opportunity to develop differentiated pay plans; all 134 local districts in the state included differentiated pay in their School Improvement Plans. The General Assembly allocated $77 million to support differentiated staffing plans in 1990-91. This includes two sums: $38 million to the 16 systems that participated in a pilot program of the North Carolina Career Development Plan during the last four years and $39 million for the remaining districts, who are in their first year of implementation. Funding to non-Career Development Plan pilot districts is based on state-funded salaries for certified positions and will be phased in over the next five years at two, three, four, five and one-half, and seven percent of district-certified salaries. (Most certified positions in North Carolina are state-funded; the state provides actual salary levels of persons employed in state-funded positions, rather than an average salary per position.)

Local district plans were submitted to the State Superintendent of Public Instruction for approval. Plans had to show that teachers had been involved in the design and verify that a majority of teachers and administrators in the district had voted for the plan in a secret ballot. Plans had to provide for differentiation among participants, not across-the-board raises, to be approved.

Although each district developed its own differentiated pay plan, they tended to incorporate similar ideas and most plans included multiple options by which participants could earn differentiated pay. A review of plans shows that:

- 107 pay teachers for taking on expanded responsibilities;
- 62 provide rewards based on student or school outcomes;
- 61 use meritorious performance as a basis for differentiated pay;
- 56 provide extra pay for teachers and, in many cases, administrators participating in staff development and/or educational activities;
- 40 offer incentives for attaining specified levels of performance; and
- 6 pay teachers who accept special (hard to fill) assignments.

Many districts established district-wide committees to administer plans. However, 49 plans specifically granted individual schools almost total autonomy to manage their plans and distribute differentiated pay funds. While most districts submitted three- or five-year plans (local plans could be for up to five years), 24 systems elected to use the 1990-91 year for further study and submitted one-year plans.

The School Improvement and Accountability Act had special implications for the 16 school districts and over 6,000 educators that pilot-tested the North Carolina Career Development Plan as their differentiated staffing plan. These districts had to show how, by

1994, they planned to reduce program costs to the funding level available under the School Improvement and Accountability Act and had to provide the results of a secret ballot that showed support for continuing the Career Development Plan. All 16 pilot districts continued with the Career Development Plan.

When it was fully implemented, program costs for the Career Development Plan (including merit awards of five and 15 percent over state salary levels for Career Status I and Career Status II for qualified teachers and administrators, pay for teachers performing extra duties, funds for staff development, and administrative costs for local programs) were between 12 and 14 percent of certified salaries. During the pilot period, the state fully funded actual program costs in participating districts. Over 80 percent of costs went to participants for merit awards and pay for extra responsibilities. The School Improvement and Accountability Act (1989) froze funding at the 1988-89 level and, as noted above, directed pilot districts to reduce funding to seven percent of certified state-funded salaries by 1994.

In the 1990 legislative session, funding for the Career Development pilot districts was reduced to $38 million, which is below the 1989-90 funding level but not down to seven percent of certified state-funded salaries. Teachers' earnings were held "harmless," so that the combination of a teacher's salary and merit bonus could not be less than the teacher's pay in the prior year. Some funds remained for local administrative costs (program coordinators and peer evaluators), but districts have had to reduce or eliminate most other aspects of the program. The majority of participants in the Career Development Plan pilot districts have expressed the desire to maintain individual merit bonuses. As a result, at the same time that non-pilot districts are exploring ways to provide educators with options by which to earn differentiated pay, pilot districts are eliminating or severely reducing pay for teachers who choose to take on extra responsibilities.

North Dakota

In 1986, a state model for in-service education and staff development was adopted. The model is designed to guide local districts in meeting the professional growth needs of teachers. However, no state funding has been available to address the needs of veteran teachers.

Ohio

In December 1984, the State Board of Education adopted the Master Plan for Excellence that called for the establishment of a career ladder and peer review program. The State Department of Education and Miami University conducted a study to determine the feasibility of implementing a statewide career ladder program. The study, completed in June 1987, suggested that districts should develop local incentive programs with state assistance and using state-adopted basic guidelines. For the 1989-91 biennium, the legislature provided $2,080,000 to support pilot incentive projects in Toledo and Columbus. The Toledo project involves a career ladder with six levels after the initial qualification stage. The initial qualification is based upon five areas--letters of reference, a written essay, an interview before

a three-member committee, a project, and six classroom observations by three mentor teachers. Movement further up the ladder requires classroom observation and additional assignments. Teachers may opt to remain at the third level of the ladder, which requires periodic observation to hold that position. Requirements for the top two levels require a master's degree or graduate hours in an academic area.

The Cincinnati school district is implementing the Career in Teaching Program, a four-step career ladder plan, with a $400,000 grant from the state for start-up costs over two years and $500,000 in district funds. Teachers with 10 years of experience (the last five in Cincinnati schools) are eligible to become lead teachers and will receive stipends ranging from $1,000 to $5,500 depending on the additional duties they assume. They will be selected based on evaluations by other teachers as a part of the district's peer-review program initiated in 1985. By 1992-93, 10 percent of the city's teachers (about 340) will have the opportunity to be designated as lead teachers; current funding is available for 82 positions.

In June 1989, the legislature authorized the State Department of Education to develop a plan to phase in merit pay and career ladder programs statewide and submit the plan to the General Assembly by December 31, 1990. The Department of Education developed a committee to study merit pay and career ladder pilot programs in the Columbus and Toledo city school districts, along with other programs in Ohio and in other states. The committee has met and developed specific recommendations, along with components that will be needed for local districts to implement these programs. The committee is now in the process of determining a statewide cost for implementation of the merit pay and career ladder programs that will be included in the plan submitted to the legislature.

Oklahoma

As part of a comprehensive educational reform bill passed by the legislature in 1990, the local boards of education were called upon to adopt academically based, district incentive pay plans beginning with the 1991-92 school year. The local boards may adopt their own plan or choose one of five model plans developed by the State Board of Education. Plans may not permit more than a 20 percent increase in a teacher's salary for one year. A local board must also appoint an advisory committee consisting of teachers, parents, and local citizens to advise the board in formulating an incentive pay plan.

Beginning with the 1991-92 school year, a school district is required to adopt and implement an incentive pay plan following the receipt by the local board of education of a petition signed by 20 percent of the district classroom teachers calling for the adoption of an incentive pay plan. Local districts are also required to provide for a local evaluation committee to advise the board on which teachers are to receive incentive pay awards and the amount of each award.

The comprehensive 1990 legislation, which increased funding for education, included a $9,000 pay raise for beginning teachers over the next five years. The entry-year assistance program for beginning teachers continues, providing guidance and assistance to all first-year teachers. Since the program began in 1982, over 10,000 teachers have gone through the

process. A team, consisting of a teacher consultant, a school administrator, and a faculty member from an institution of higher education, assists the teacher and makes a recommendation on certification. Teacher consultants are paid $500 and funds are appropriated to the institutions of higher education for faculty time.

Oregon

The 1987 legislature passed a bill providing for a professional development and school improvement program designed to address four areas: 1) the development of educational goals for individual schools and districts; 2) the assessment of educational progress of school programs and students; 3) the professional growth and career opportunities for Oregon teachers; and 4) the restructuring of the school workplace to provide teachers with the responsibilities and authority commensurate with their status as professionals. For the 1987-89 biennium, $2.4 million was appropriated to support pilot projects developed by local committees at 70 schools across the state. Funds were allocated by providing $1,000 per teacher at each pilot site. For 1989-91, the legislature appropriated $4.6 million to continue this project and add additional sites; the pilot sites have been expanded to a total of 86 schools.

Within the same legislation, the Beginning Teacher Support Program was established to ensure that the induction of beginning teachers is conducive to professional growth and development. As outlined in the law, each district that qualifies to participate in the program will receive $3,000 to support each beginning teacher. Biennial funding was provided at a level of $3.9 million; 650 beginning teachers and their mentors will participate in the program each year of the biennium. Also established in 1987 was the Oregon Teacher Corps Program. Designed to encourage students to pursue teaching as a career, the program provides educational loans primarily to academically talented students, minority students, and students desiring to teach in remote locations or in shortage areas. For the 1989-91 biennium, $213,000 was appropriated to continue this program.

In 1989, the legislature adopted the 21st Century School Program to make fundamental changes to school operations and to formal relationships among teachers, administrators, and local citizens. Schools or districts submit plans to the State Department of Education that include, for example, proposed changes to curriculum requirements; graduation requirements; and the certification, assignment, and formal responsibilities of teachers, administrators, and other school personnel. The student learning and educational outcomes that are expected and a description of the statutes and rules that are to be waived to complete the plan must also be included. Annual reports showing changes in student learning and other performance indicators are required to be submitted to a state advisory committee and to the community.

Pennsylvania

In 1984-85, the State Department of Education awarded $4 million in grants to local districts for locally-developed efforts to improve instruction through training, to sponsor new programs developed by teachers, and to provide incentives for teachers. Nearly all of the

state's 500 districts participated in the initial program, which received the same appropriation for 1985-86. For 1986-87, the state legislature increased the funding to $7 million; 67 of the districts developed incentive programs. Allocations were made after local districts submitted a written proposal for approval by the State Department of Education; funds were distributed according to a formula based on a pupil/teacher ratio.

With a change in the state administration, the scope of the program was modified for 1987-88--$4 million was appropriated for districts to promote effective teaching. Districts were awarded subsidy funding based upon a formula and could use the funds to support such programs as mentor teacher and continuing professional development. No funds were provided for incentive pay.

In 1990-91, $1.5 million was appropriated for the continuing professional development of teachers. Of those funds, $1.3 million will continue to support seven regional lead teacher centers and to initiate two additional centers. Remaining monies will provide limited support for 17 consortia representing nearly half of all Commonwealth districts. It is expected that about 1,000 teachers will annually receive training to assume instructional leadership roles at their schools.

Districts are required by law to implement school-based induction and professional development programs as a part of the state's certification requirements. Guidelines for these programs are provided by the State Department of Education and districts submit their plans to the Department for approval. Funds are not earmarked specifically for these programs; districts use formula funds to carry out the state mandate.

Legislation passed in 1988 created the School Performance Incentives Program. This program grants awards to schools demonstrating sufficient improvement in any of three areas: student achievement as indicated in statewide testing, reduction of dropout rates, and preparation for higher education as indicated by simultaneous rises in the Scholastic Aptitude Test (SAT) participation rate and scores. Funds are allocated among the recipient schools in proportion to their numbers of full-time-equivalent teachers. Subject to the district school board's approval, the staff of the recipient school decides how to use the award to further improve education within that school. The program forbids use of awards for salary increases or bonuses to current employees. Early in 1989, this program distributed $5 million to 202 schools; in 1990, an identical sum went to 235 schools. The 1990-91 budget again includes $5 million for this program.

Rhode Island

A beginning teacher induction program continues to be discussed. The Board of Regents for Elementary and Secondary Education included in its 1990-91 budget a request for $250,000 to fund pilot mentor teacher projects. Funding, however, was not provided.

Staff in the Office of Teacher Education and Certification are working with a regional educational laboratory and other states in the Northeast to develop mentor teacher training materials. The proposed target date for pilot projects in the Northeast region is August 1991.

South Carolina

The South Carolina Education Act of 1984 established three incentive pilot programs. All have been expanded to statewide programs.

The *School Incentive Reward Program.* The School Incentive Reward Program is now beginning its sixth year. Legislation in 1989 made School Incentive Program awards (in two of three years) the primary criteria for granting flexibility to schools through deregulation. One-fourth of the 1,014 schools in the state received $4.4 million in rewards during 1989-90, up slightly from $3.9 million a year earlier. Rewards are based on schools meeting criteria that include student achievement gain and improvement in student and teacher attendance. The achievement gain criterion must be met for a school to receive a reward; attendance rates qualify reward winners for additional funds.

Schools meeting all criteria received $29.27 per pupil to be used for instructionally-related expenses. Schools also received flags and certificates signifying their reward status. An additional 164 schools were awarded honorable mention status for showing improvement in student achievement. School Improvement Councils, whose members include the principal, teachers, and parents must be actively involved in deciding how the funds are to be spent. (The funds cannot be used for staff salaries or to supplant regular district funding.)

Individual student scores are tracked from one year to the next to determine progress. The student results are aggregated at the school level, and the top quarter of schools are rewarded in each of five comparison groups. The comparison groups are based on student backgrounds and school resources. Districts in which two-thirds of the schools were incentive winners receive an additional $2 per student. Vocational centers are eligible for rewards if their sending schools meet the student achievement criterion and the vocational center achieves three-year student placement rates of 50 percent or greater for 90 percent or more of their vocational programs. Four school districts and 28 centers received rewards in 1988-89.

The most recent survey of attitudes toward the program, conducted during the 1987-88 school year, found that most respondents regarded the program favorably; 90 percent of principals and teachers supported the concept of rewarding schools for achievement gains and 85 percent believed that goal-setting and hard work won awards.

South Carolina Principal Incentive Program. After three years of pilot testing, South Carolina's Incentive Program is being implemented throughout the state for the second year in 1990-91. Funds of $1.46 million are available for incentive awards and program operation in 91 regular and 2 special school districts. Incentive awards for principals will range from a minimum of $2,500 to a maximum of $5,000.

The program continues to offer districts a choice of three models: "Management by Results," "Extended Evaluation," and "Combination." Each model requires that principals demonstrate superior performance and productivity in comparison to other principals in the district. In addition, before receiving an incentive award, principals must achieve a performance evaluation rating that indicates a superior performance on South Carolina's statewide Principal Evaluation Program Instrument. Participation in the program by individual

principals is voluntary. In 1989-90, the first year of statewide implementation, approximately 60 percent of the principals in the state participated in the program.

Five external evaluation reports of South Carolina's Principal Incentive Program (PIP) have now been completed. These studies describe the principals' understanding and acceptance of the program, participation rates, the characteristics of incentive award recipients, and the relationship of incentive awards to other measures of superior performance and productivity. In the 1988-89 pilot test, the schools of those principals who received Principal Incentive Program awards exhibited greater student achievement gains, as measured by South Carolina's School Gain Index, than the schools of principals who did not receive awards or who did not participate. A relationship is also evident between receiving an award in the Principal Incentive Program and receiving an award in South Carolina's School Incentive Program. In addition, teachers who had principals who received Principal Incentive Program awards gave their schools significantly higher than average ratings on South Carolina's Effective Schools Surveys. Approximately 48 percent of the principals participating in the 1988-89 pilot test received incentive awards. These principals represented approximately 25 percent of all principals in the participating districts.

Teacher Incentive Program. This program, which started as a $2.2 million project in nine districts, has now become a $21.5 million statewide project. The program rewards teachers for superior performance and productivity. The 1984 law called on districts to develop models, and a *bonus* plan, a *career ladder*, and a *campus/individual* plan were produced. Districts then designed programs according to the models. The *bonus* model rewards teachers for superior performance in attendance, performance evaluation, student achievement, and self-improvement. The *campus/individual* model rewards teachers for individual and collective efforts within a school for the same four criteria. Based on recommendations of advisory groups, which included teachers and legislators, the *career ladder* model has been phased out. It was believed that the *career ladder* model, as it was being implemented, depended too much on documenting extra activities or work. All models now have weighted criteria to emphasize performance and student achievement rather than other criteria, such as attendance or additional duties.

South Dakota

In 1985, the legislature enacted a career ladder for teachers and administrators, but implementation of the plan was blocked by a petition drive which, although not aimed at the career ladder, effectively thwarted the legislation of which it was a part. Originally, a three-level career ladder certification system would have been created. Provisions relating to only the first level in the original ladder have been retained.

Legislation passed in 1986 created a statewide induction program for first-year teachers and administrators. Under this program, first-year certificates were issued to new teachers and administrators. During the first year, each was assisted and evaluated by a team representing the local school district, higher education, and the South Dakota Department of Education. At the end of the year, the team either recommended full certification or another year in the induction program. For 1988-89, $300,000 in state funds were appropriated for this

program. No further state funding has been provided, however, districts may continue or initiate mentor programs with local funding.

In July 1990, an ad hoc committee of 28 educators met to review administrative rules governing teacher education and certification. One of the most significant proposals to be submitted to the South Dakota Board of Education is the initiation of the teacher educator program, an incentive program for career teachers that will improve the supervision of student teachers and effectively provide assistance to first-year teachers. The Department of Education has budgeted $150,000 to work with 150 career teachers who have elected to earn the teacher educator endorsement. Requirements for the endorsement include a 3-credit semester course in supervision/collaboration, 3 years of successful teaching experience, and recommendations from the university and the local school administrator. "Teacher educator" is a new class of teacher, responsible to the university, for the supervision of student teachers and first-year teachers. Many will have university faculty associate contracts. Within five years, full funding of $1 million for the program is expected.

Tennessee

The Career Ladder Program is in its seventh year of implementation statewide. The program for 1990-91 has received an allocation of $89 million of which approximately $82 million is used for Career Ladder salary supplements and extended contract payments. An additional $15 million is allocated for retirement benefits for educators. The program includes a three-rung ladder for teachers (general education, vocational education, and special education), counselors, librarians, school psychologists, speech and language specialists, school social workers, attendance supervisors, instructional supervisors, assistant principals, and principals. Salary supplements range from $1,000 to $7,000, according to the Career Ladder level and length of contract. Presently, 43,007 educators are on the ladder, with 8,683 teachers and administrators at the upper levels. Approximately 99 percent of all those eligible (educators in their first four years of teaching and some central office personnel are not) are on the first level and about 28 percent are on the top two levels. Around 1,000 teachers and administrators have applied for evaluation for the upper levels during 1990-91.

Teachers are evaluated by the local school district during their first four years and, if they are successful, receive a 10-year professional license. Educators may voluntarily seek Career Levels I, II, or III, based on evaluation of performance in the classroom or workplace and years of experience. Career Level I is determined by local district evaluation. Career Levels II and III may be determined by a three-member state evaluation team or an evaluation team composed of the teacher's principal and two state evaluators. The teacher may choose either evaluation model, but the principal and the teacher must both agree to the latter "combination" model.

Since 1989, educators who are not on the upper levels of the Career Ladder have been allowed to participate in the extended contract program. This program provides extra money to educators for additional work, primarily during the summer. A school district's extended contract program is based on student needs and may include adult literacy and extended school child care activities. Last year, for the first time, educators who taught or administered

in a public adult high school setting or in an Adult Basic Education program were eligible for the Career Ladder.

Texas

During 1990-91--the seventh year of the Texas Teacher Career Ladder Program--teachers who have advanced to, or have been maintained on, Level II will be receiving salary supplements ranging from $1,500 to $2,000; teachers at Level III will be paid a supplement ranging from $3,000 to $4,000. It is anticipated that Level IV, the highest level planned, which will pay teachers an additional $4,500 to $6,000, will be implemented in 1991-92. A master teacher exam is being developed as one of the criteria for advancement to Level IV.

Teachers move up the levels of the career ladder by scoring well on the Texas Teacher Appraisal System (TTAS), which is a measure of classroom performance; by meeting requirements of job-related education (either formal higher education courses or clock hours of workshops); and by meeting experience (tenure) requirements at prior levels. Performance appraisals are used to determine if teachers are to maintain their advanced levels on the career ladder.

The program is funded for 1990-91 through state allocations based on a formula per average daily student attendance (ADA). The 1989 legislature increased the funding from $70 per ADA to $90 per ADA in fiscal year 1990.

The Texas Governor's Educational Excellence Award Program focuses on the related problems of students dropping out of school and low student achievement. In fall of 1990, schools received from $10,000 to $100,000 awards. The funds can be used for any educational purpose within a school, but cannot be used for salaries or athletics. Almost 300 Texas schools shared $7.7 million for improved test scores. Scores on college entrance tests and higher participation rates in taking college entrance tests are part of the criteria for high schools.

In Texas, legislation passed during a special session of the 1990 legislature exempts schools from state regulations if they are rated exemplary in the state accreditation process. The State Education Agency will monitor the effects of deregulation on student achievement and report to the governor, legislature, and State Board of Education.

Utah

Funding for Utah's Career Ladder program continues at $41 million in 1990-91, the fifth year of the program. Allocations to the state's 40 school districts are based on weighted pupils and the number of certificated educators employed by each district. District-designed plans are developed following 1984 guidelines established by the legislature. A request for full funding is being made to the legislature this year, with hopes of adding $6.7 million to the program for each of the next three years.

The Career Ladder Program has four major parts: performance bonus, job enlargement, extended contact day, and the career ladder. Performance bonus recognizes and rewards excellence in the classroom. Job enlargement provides extra pay for extra work. Extended days provide for paid non-teaching days beyond the regular school year. Teachers are placed on the career ladder based on their experience and expertise. By law, 50 percent of the total funding must be spent on the ladder, job enlargement, and performance bonus.

In 1990, 10 school districts received career ladder funding in a "block grant" allocation, which frees them from the normal program requirements, including reporting. Evaluations will be conducted this year on several parts of the Career Ladder program.

Vermont

As part of new certification regulations adopted by the State Board of Education, the 23-member Standards Board for Professional Educators was created. A majority of the board members are teachers; the others are administrators, school board members, and representatives of higher education. The board is not considering any career ladder concept or performance-based incentive program at this time. However, the board is responsible for establishing local standards boards in each district in the state to recommend license renewals for practicing teachers. Local standards boards, a majority of whose members are selected by educators, will approve each teacher's Individual Professional Development Plan and determine the appropriateness of teacher learning activities to meet individual, school, and district needs. When a license is due to expire, local boards will review a completed teacher portfolio based upon that plan and make recommendations for renewal. These local standards boards will begin operation by September 1, 1991.

Virginia

Virginia has proposed an Educational Performance Recognition program. The program is designed to improve student learning by focusing the accountability for public schools on outcomes. Accreditation standards will be focused on results, rather than the current emphasis on courses, programs, and library use. Schools that are the highest performing will be rewarded and programs will be available to assist schools that are not. Results in improved student achievement, percent of high school students receiving advanced high school diplomas, and graduation rates of vocational students will be used as indicators.

Fairfax County Schools implemented a new teacher performance and pay-for-performance plan. The plan includes professional growth opportunities, recognizes outstanding teaching, assists beginning teachers, and links pay to performance. The plan includes a three-step career ladder. The teacher performance evaluation system was piloted and phased in for all schools during the 1987-88 school year. A teacher may move to Career Level I after three years of classroom experience and an "effective" rating. Teachers may reach Levels II and III by achieving ratings of "skillful" or "exemplary" on their evaluations. The evaluation process includes peer and supervisor review and self assessment on goals.

During 1984-86, Master Teacher and Pay-for-Performance programs were piloted. Outside consultants reviewed the plans and reported that, despite problems with communications, pay-for-performance programs can work. The State Board of Education endorsed the concept. A survey in 1987 of 136 pubic school districts showed that 13 districts were conducting teacher incentive programs. Districts developed different approaches and purposes. Half the plans used student achievement as one of many criteria and it is the sole criterion in two plans. In 1990, there is no emphasis on incentive plans.

A 1988 law established a Clinical Faculty Program for the training of classroom teachers, who receive stipends to supervise and evaluate student teachers. Program criteria were established by the Council of Higher Education and the State Board of Education.

Washington

The Teacher Assistance Program, now in its sixth year, is operating with an appropriation of $3.7 million for the 1989-91 biennium. Currently, 1,000 teams of one mentor and one teacher or other educational personnel (such as counselors, nurses, and school psychologists) are being supported. Beginning personnel are involved in 900 of the teams; the remaining 100 teams pair an experienced person (for example, a teacher re-entering the profession or one who is changing subject areas) with a mentor.

A program initiated two years ago, Schools for the 21st Century, provides grants to schools to develop innovative programs. There were 135 applications for the six-year grants; 21 schools received grants from $3.5 million appropriated for 1989-91. The proposals were developed at the school level with parent, teacher, and administrative input. The grants may be used, for example, to purchase equipment and supplies, provide in-service training for instructional staff, and pay staff for working additional days (all of the proposals added at least 10 days to the teachers' school year). There is variation in the funded proposals and schools were permitted to request exemptions from normal state regulations. One proposal, for example, reduced the traditional 5-day week for students to 4 days, designating the fifth day for in-service training for teachers. The school year was extended through July and services for the "extended learning family" (birth through adult) were incorporated into the school program. In 1990-91, with $1.7 million, 12 additional grants have been awarded to schools. This brings the total number of schools receiving grants to 33.

West Virginia

Comprehensive legislation enacted in West Virginia during 1990 included several programs for teachers. A beginning teacher internship program (funded at $1.5 million) is to be established; guidelines are being developed. Support teams for beginning teachers will include a principal, a county staff development council member, and an experienced classroom teacher. A requirement calls for the mentor teacher and the beginning teacher to have joint planning periods during the day. Mentor teachers will be trained and will receive $600 in additional compensation.

The law also established a uniform, statewide system of evaluation, with development of a common evaluation instrument and training for evaluators. The legislation also established the Center for Professional Development and provided $2 million in funds. The Center will identify appropriate performance requirements for certification and continuing education; will train teachers in developmental instruction, emphasizing grades K through 4; and will provide training on evaluation skills for administrators, principals, and mentor teachers. Also included is the Project for Instructional Renewal through Science and Technology (Project FIRST), which will assess the best ways to use and provide training for educational technology.

In addition, every school will have local school improvement councils that include the principal, teachers, parents, and other citizens. The councils can develop alternatives for the school, such as applying for waivers of policies and rules. Each school will have a faculty senate with authority to develop school-based management procedures or policy. Decisions might include employment of new teachers, recognition of outstanding teachers, and development of the master curriculum. Each faculty senate will decide how an allocation of $150 of the $200 alloted to teachers for instructional materials will be spent.

Wisconsin

In 1985-86, the Wisconsin State Department of Education issued guidelines and standards to be used in the development of local district proposals for teacher incentive pilot programs, which might focus on awards, a career ladder, or first-year assistance programs for beginning teachers. Funding of $1 million was provided for the initial two-year period (1985-87). Eight proposals, involving 35 to 40 local districts, were initially funded and continued their pilots in 1987-88, with a one-year extension of funding at a level of $214,000. No further funding has been provided. A follow-up report on the pilot projects offered two conclusions.

- Beginning teacher assistance programs work when they are planned, funded, and coordinated by the state. It is both appropriate and within the means of the state to ensure that beginning teachers are well prepared and supported during their first year.

- Career ladder programs and teacher recognition awards do not benefit from state direction. The long-term career needs and resources of teachers in individual districts are so distinct from each other that these two kinds of programs should be developed when there is sufficient local interest and resolve to implement them effectively.

The State Department of Education is seeking $2.5 million to implement a statewide beginning teacher assistance program.

Wyoming

Although there was some discussion in 1984 relative to the consideration of merit in teacher compensation, no statewide action has been taken. Local districts have the flexibility to initiate teacher improvement programs; however, Wyoming's economic condition is hindering local efforts to do so.

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